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Warwickshire Future Places Routemap: Mid-project report

Dr Steve Millington, Joe Barratt and Tom Hindmarch

September 2021



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About the Institute of Place Management

The Institute of Place Management is the professional body for people involved in making, maintaining and marketing places. As part of Manchester Metropolitan University, the Institute of Place Management is dedicated to supporting people who serve places, providing them with unbiased research, continuing professional development, qualifications, conferences, events, and networking opportunities.

Authors

This report has been written by an interdisciplinary team of academics and practitioners from the Institute of Place Management.

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Tom Hindmarch

Tom Hindmarch is the membership coordinator and events lead at the Institute of Place Management. Tom has been with the IPM team since 2017, managing and coordinating activity across key projects such as IPM's annual conference, the Vital and Viable programme, and High Streets Task Force. In addition, Tom has recently completed an MSc in Place Management and Leadership, completing research on place management capacity and place-based strategies.

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Foreword

This report has been prepared following a series of online workshops for key local stakeholders in Warwickshire, delivered between May – July 2021. This programme delivered by the Institute of Place Management in partnership with Warwickshire County Council is taking a holistic view, the first three sessions of the programme have analysed the challenges and opportunities for places considering the Covid-19 pandemic.

Led Dr Steve Millington, a Director of the Institute and supported by Tom Hindmarch (Membership coordinator) and Joe Barratt (Junior Fellow), the workshops have engaged over 30 local stakeholders representing a variety of different centres within the region.

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Background and context

The global pandemic has provoked intense debate about the decline, or even death, of the high street. With a keen eye for attention grabbing headlines, the national media is extremely willing to write about the demise of national multiple retailers, declining footfall and increasing retail vacancy. Less reported is how retail change connects to long-term processes stretching back over decades, and, despite proclamations about the end of the high street, many centres across the country are performing well and some are even thriving.

What is clear, is the pandemic has accelerated the growth of online shopping, changed consumer priorities, affected on travel and holiday plans, and transformed how and where we work, all of which will have implications profoundly affecting high streets and town centres. Although attention is currently on post-pandemic recovery, it is important places also recognise and understand the dynamic long-term processes that render high streets and towns in a constant state of flux and enact plans addressing both their immediate recovery and long-term transformation.

Before the pandemic, support for town centres and high streets was high on the UK government's agenda. In 2019, the Prime Minister announced the £3.6bn Towns Fund and invited 100 places to develop Town Deals, which would set out investment priorities and project proposals in a locally owned Town Investment Plan. This was complemented by the Future High Streets Fund, which allocated £830m to help 72 areas in England recover from the pandemic and deliver ambitious regeneration plans.

However, it became clear that additional immediate support was needed to ensure the survival of towns and high street businesses. In response, the government provided a multi-billion-pound package of support through rates relief, grants, and the furlough scheme. More recently, the government launched a £56 million Welcome Back Fund to support the safe reopening of high streets. We are encouraged Warwickshire County Council recognises the need to act quickly and have enlisted the support of IPM to build consensus amongst stakeholders across the region.

As we look to the future, it is essential centres of all scale adapt to this rapidly changing environment. As a result, local place management and leadership are more important than ever before. In addition to combatting the pandemic's short-term impact, all stakeholders need to consider the longer-term future of their locality, identifying and driving forward change as the 'new normal' begins to take shape.

The IPM is uniquely placed to support Warwickshire on the road to recovery, drawing on extensive research on town centre change and more recently on recovery from the pandemic. Funding and additional support for town centres was strongly advocated in a report from the Expert Panel established by the then Minister for the High Street, Jake Berry, and led by Sir John Timpson.

During 2018, the Institute of Place Management supported the Panel, holding workshops in six locations across the country to hear first-hand the opinions from local stakeholders about the challenges and aspirations regarding town and city centres. The evidence presented in the IPM's

report *High Street 2030: Achieving Change*¹ informs the recommendations made by Sir John Timpson.

Subsequently in 2019, following a successful bid, the IPM was appointed to lead the government's High Streets Task Force (HSTF), alongside a consortium of partners. The HSTF was set up to provide expertise, knowledge, training, and support to those involved in helping to regenerate town and city centres across England.

Since 2020, the IPM, through the work with the HSTF, has been at the forefront of research on town centre recovery and transformation, firstly producing the 'COVID-19 recovery framework' (see Figure 1 below), and the 'Routemap to Transformation'². Both frameworks have been widely adopted and adapted by places throughout the UK and Europe, including major cities like Liverpool and Newcastle and multiple locations across Greater London.

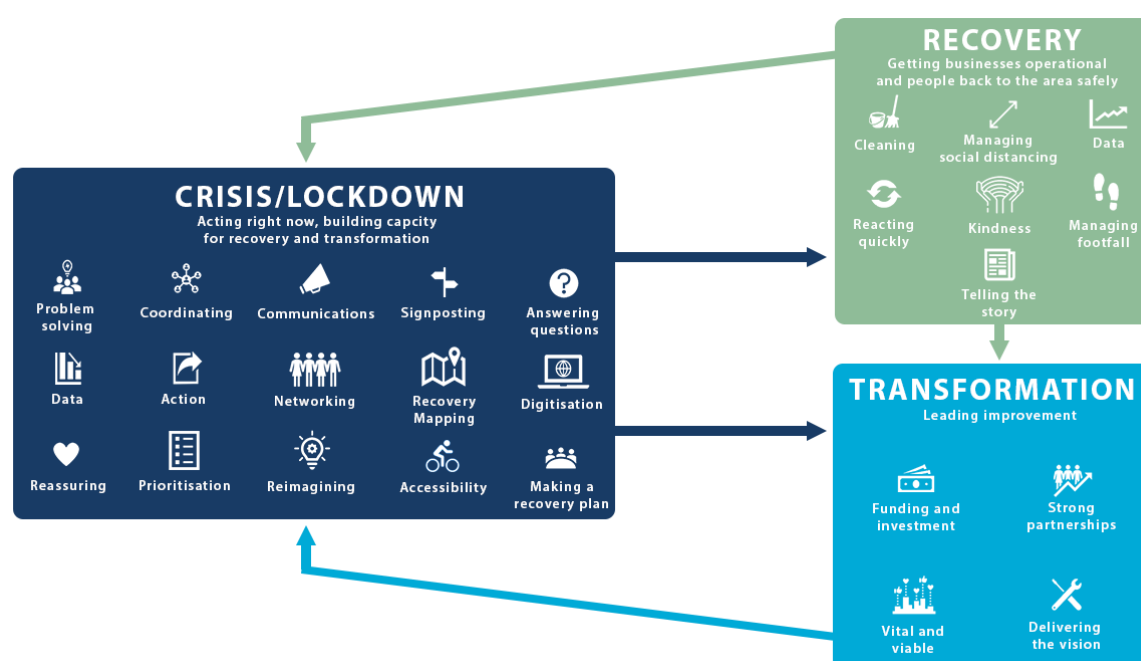


Figure 1: IPM's COVID-19 recovery framework

This report also draws on IPM research and frameworks such as 'the 25 factors for vitality and viability'³ and the '4Rs framework'⁴, which were developed in consultation with key national stakeholders, policy professionals, practitioners, and importantly in partnership with places themselves.

¹ <https://www.highstreettaskforce.org.uk/resources/details/?id=f8f07583-af7b-4b91-a3d1-3c9b3aa905ba>

² <https://www.highstreettaskforce.org.uk/transformation-routemap-webinars/create-a-transformation-routemap-for-your-town/>

³ <https://www.highstreettaskforce.org.uk/frameworks/25-vital-and-viable-priorities/>

⁴ <https://www.highstreettaskforce.org.uk/resources/details/?id=b38091e3-488b-4e4a-a24a-bd5bd37534d6>

The changing high street

The first sessions provided by the IPM for Warwickshire County Council in May and June, focused on the challenges facing high streets and centres resulting from both COVID and long-term structural change. This section is a summary of these issues.

Undeniably, coronavirus has had a profound effect on high streets and town centres, not least because people were requested to stay at home during lockdown. However, there were several factors negatively affecting high streets prior to the pandemic. For example, footfall had been decreasing year-on-year for over a decade, falling by 20%. In the same period, multiple retailers going into administration or announcing store closures had seen over 26,000 units close (CRR 2019). This dramatic change in the retail landscape appears to have been driven by an over-expansion in previous years, rising property costs, and through the growth of online shopping.

In 2019, online shopping accounted for 19.2% of all UK retail sales in 2019 (compared to an average of 12% across European countries). Due to the enforced closure of bricks and mortar during lockdown, online sales grew rapidly in the UK, peaking at 37% in November 2020, although this fell back to 25.5% in August 2021 with shops reopening. However, this still is a substantial gain on pre-pandemic levels, with online sales likely to account for at least 30% of all retail sales by 2030.

Another long-term challenge to town centres is out-of-town shopping. In 1994, just 14% of retail development was happening in town centres, leading to planning policies requiring a 'town centre first' approach. Although this limited the development of new mega-malls, it did not manage to prevent the expansion of out-of-town retail parks and supermarkets. Between 2001 – 2011, over 4 million sq. metres of new retail space was constructed, which saw footfall deflections from town centres of 30% on average. Notably before the advent of online shopping began, town centres continued to see their share of retail expenditure decline to just under 50% by 2000, falling from 75% in the 1970s. In 2018, the Centre for Retail Research estimated the town centre share had declined to 36.6%, with a projection it would decline further to 34% by 2022.

These factors illustrate the long-term systemic shifts high streets have experienced over several years. The pandemic, however, has had a major impact over a brief period. In March 2020, within a week of the announcement of lockdown measures across the UK, footfall was down 81.4% compared to the same period in 2019. Across the whole of 2020, footfall was down 28.3% compared to the previous year. Whilst this was the national average, figures did fluctuate across the UK, with footfall dropping by 75.9% in large cities, but falling by just 34.5% in smaller towns and district centres. With the rise in working from home, many people began to use their nearest or most convenient local centre to where they lived, rather than where they worked.

ONS suggests the number of people working from home increased by 9.4% in 2020, who worked from home in 2020 increased by 9.4% compared to 2019, more than 11 million employees. With large employers such as JP Morgan, HSBC and KPMG announcing plans to permanently allow employees to work from homes, together with the increasing prevalence of job adverts saying people can work from 'anywhere,' thousands of staff may never return permanently to offices located in city centres. To what extent people return to office work, however, is still to open to speculation.

Certainly, the current situation opens opportunities for smaller towns who might capitalise on the increased numbers of working locally at home. It is incumbent on smaller centres to become more welcoming and attractive destinations. For example, during the pandemic it became clear that

walking and cycling became much more important in how people travelled to their local centres. This was facilitated by a £250m Emergency Travel Fund to create measures to reallocate road space for cyclists and pedestrians including pop-up bike lanes, wider pavements, cycle and bus-only corridors, and the closure of side streets. A few localities also employed a range of tactical urbanism measures to encourage more people to walk and cycle safely. It is not surprising, therefore, that the “15-minute neighbourhood” concept is gaining traction, a framework for reconstructing places so that walk or cycle to all the local services they might require.

Other measures to improve accessibility in centres included the relaxation of constraints on street-trading and alfresco outdoor dining, such as making it quicker and less expensive for businesses to acquire a temporary pavement licence. The government also introduced several additional changes to the planning system which are likely to have an impact on the high street, including the ability for commercial, retail, and certain leisure businesses to change use without needing planning permission and allowing empty shops, restaurants, and offices to be converted into new homes through new permitted development rights. A consideration of how green infrastructure can be best integrated into high streets to create high-quality natural spaces that deliver multiple benefits for people and the environment has also been recognised by the government as being key to future planning policy and a National Framework of Green Infrastructure Standards will be launched in 2022.

Whilst the pandemic prompted a more flexible and responsive approach to designing the high street around the needs of people, the retail sector still struggled under the weight of long-term structural issues mentioned previously. In 2020, the high street lost 5,214 stores (CRC 2021), the highest figure on record since 2009. This affected an estimated 109,407 employees, the highest amount on record by some distance. One of the UK’s largest operators, Intu Properties, with a portfolio including some of the largest UK retail malls such as Manchester’s Trafford Centre, Nottingham’s Victoria Centre, and Norwich’s Chapelfield, fell into administration in June 2020 with total debts of £4.5bn. In December, big name casualties, including the oldest retail chain in the UK, Debenhams, went into liquidation, with 97 stores closing. Others, including Arcadia, the parent company of big-name brands such as Topshop, Dorothy Perkins, Burtons and Miss Selfridge, closed, with ASOS and Boohoo, the online fashion retailers, acquiring the brands for their digital presence alone.

According to KPMG, high streets could lose between 20-40% of their retail offering because of the growth of online retailing, causing 400,000 job losses on the high street. The acquisition of the Arcadia brands by ASOS and Boohoo shows that, whilst these brands still retain value, they do so from an online, rather than physical, retailing perspective. Places, however, should be cautious in responding to claims that store retail will disappear forever. Even with 30% of retail sales online, 70% remains in-store. In the last year, we have seen the biggest online retail company in the world, Amazon, rollout the first of its ‘Amazon Go’ stores in the country, opening in Ealing, West London. These stores allow customers to shop and leave without queuing, with purchases tracked by in-store cameras and sensors before charging customers using the Amazon app. Increasingly, online retailers of all sizes are looking for opportunities to promote their products in high street locations, so it is not that the ‘high street is dead’ but is instead evolving and adapting to shifts in consumer demand brought about by technological innovation. To respond to this, retailers are increasingly fusing retail and entertainment together to deliver a personalised experience. The high street, therefore, is becoming a place to ‘do,’ as much as to ‘buy,’ where opportunities to learn how to bake, mix cocktails and even drive a sports car by using virtual reality are all readily available.

As our town and city centres change in this new landscape; they also must respect wider changes in society. Overall, the UK population is growing, but it is also ageing. Over the past two decades, the

average age of a UK resident has risen by two years, to 40. Within 30 years, it is anticipated one in four people will be aged 65 and over, and the number of people aged over 85 will have doubled. Yet this ageing process is not happening uniformly across the UK. Overall, towns are getting older whilst cities are getting younger. Since 1981, Britain's towns have lost more than a million people aged under 25, whilst gaining more than two million over-65s. In contrast, the UK's main cities have seen more than 300,000 under-25s arrive and 200,000 over-65s leave. Town and city centres have the potential to play a vital role in providing for the needs of an ageing society, not just through residential provision, but also through providing activities, health and educational facilities and opportunities. This is becoming increasingly important for smaller towns, which are more likely to see their labour markets become less dynamic and suffer from further strain on health and social care, as their population ages. Attempts to bridge the gap between the young and old should be welcomed across all communities, and there is nowhere better to centre that activity than around the high street to foster inter-generational contact and exchange.

With data from the Universities of Oxford and Bristol suggesting there has been a 40% decline in 18–24-year-old car drivers now compared to the 1990s, it is no surprise we are seeing moves from cities such as Birmingham and York to ban private vehicles from driving through their centres. These moves not only help reduce air pollution and improve quality of life, but also help future proof for a society in which the increasing norm of younger professionals is to not own a car. Other places, such as Bristol, Brighton and Oxford are also introducing measures to mitigate the role that cars play within their city centre locations, and Portsmouth has unveiled plans for the UK's first ever "car-free community" as part of a new harbourside housing development. Apps such as *Whim*, which offers seamless travel by a range of modes within urban areas, may become commonplace as more places ban or restrict cars in their centres and, with evidence emerging of the positive impact that the removal of cars can make on local economies (Guardian, 2019), some transport analysts consider the 2020s could herald an end to the supremacy of the car in the minds of both the public and local planners.

The scale of long- and short-term change taking place has had a direct effect on the look and feel of our high streets. This impact is now being felt on retail property values, with recent advice from the Royal Institute of Chartered Surveyors suggesting we can no longer rely on past valuations. With shopping centre vacancy rates rising by 3.8% in the first six months of 2021 and 388 department stores closing in the past five years, with just 79 left, several shopping centres have seen their value significantly fall. It is likely that towns will need to rethink the function of these spaces and even follow the lead of Stockton, where the local authority took control of a failing shopping centre and revealed plans to demolish it, replacing it with a hub for public services and new green space. In all cases, place managers need to be agile, adaptive, and responsive to emerging developments and trends, whilst also addressing the underlying causes of urban decline that have blighted some high streets and town centres for many years.

How centre should respond

In the face of these challenges, what should be done? How do we make a centre more sustainable, a place people want to be, and a place where business can thrive? In 1994, the government commissioned the publication of *Vital and Viable Town Centres: Meeting the Challenge* (HMSO, 1994). This led to changes in national planning policy, which introduced the 'town centres first' approach. The report defined vitality and viability in respect of town centres. They are both concerned with life: the first (vitality) being about whether a centre feels lively and the second (viability) whether a centre has the capacity to attract the investment needed, not only to maintain the fabric of the place, but also to allow for adaptation to changing circumstances.

Exploring the challenges and priorities for Warwickshire

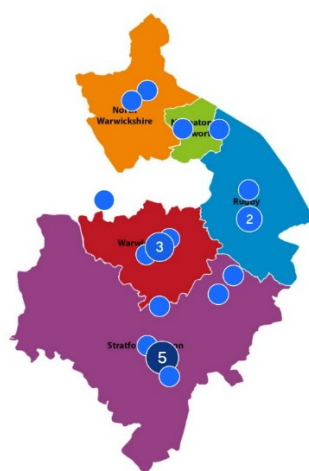
At the start of the of programme we ran an introductory session on the 5th May to introduce participants to Warwickshire Future Places Routemap as well as the aims and objectives of the programme.

Location of the participants involved in the network

Within the opening introductory session, we asked participants of the session where they were from in the region:

Place a pin on the district where you are based

Mentimeter



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From the first session most of the participants involved in the routemap were based in Warwick or Stratford upon Avon. In the subsequent sessions the attendance was similar, with lesser attendance from the Northern regions within the county. For the second part of the routemap, we would like to see a wider range of attendees from North Warwickshire, Nuneaton and Bedworth and Rugby. In addition, most of the attendees to the routemap so far have been representatives from the council, we would recommend a more diverse range of participants from local businesses, Business Improvement Districts (BIDs), residents and civic sector, together with representatives from all the towns within the county.

Place making and management in Warwickshire

Within the first session of the routemap we asked participants what they enjoyed most about making better places, the results are shown below:

What do you like most about making better places?

Mentimeter



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Figure 1: Word cloud of identified positives in Warwickshire.

Figure 1 reveals stakeholders within Warwickshire identified many positives about making places better. In total, 51 different words or phrases were used by stakeholders to describe what they liked most about making places better. Although it is great to see so many different words and phrases, it does not provide a clear picture. Therefore, the data was analysed and placed into more general themes (see Figure 2).

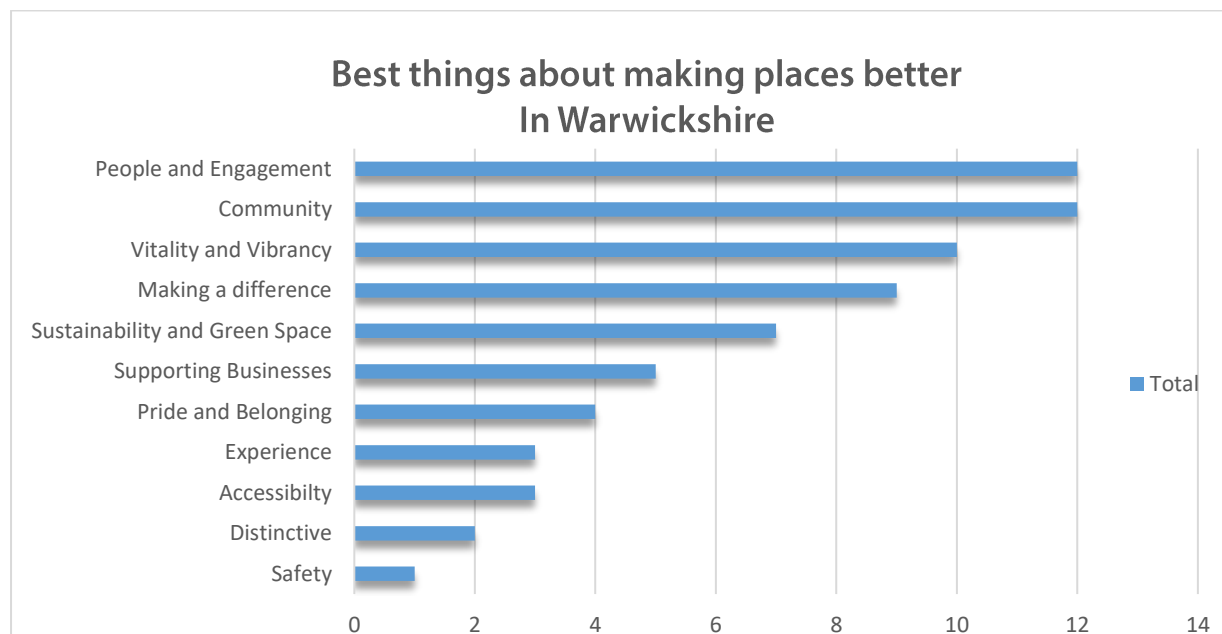


Figure 2: Word cloud themes (positives)

In total, 11 different positive themes were identified in relation to making places better in Warwickshire. The most frequently mentioned was *Community*, as well as *People and Engagement*, with over 40% of attendees mentioning community directly. *Vitality and vibrancy* and *Making a Difference* also featured strongly in participants response to the question. It was encouraging to see that stakeholders were so positive about the role they play in making places better. In addition, many of the aspects mentioned in the exercise feature in IPM's 25 factors for vitality and viability.

Identified priorities for Warwickshire

In the latest workshop, participants were split into four groups of 5 - 6 individuals to discuss what they thought the short and medium-term priorities Warwickshire's routemap should be. Drawing local opinions and the learning from the workshop series, we asked participants to consider the 25 'Vital and Viable' factors, a concept introduced to earlier in the session. The priorities from each group are summarised below:

Group 1: Led by Joe Barratt	
1.	Adaptability
2.	Networks and partnerships
3.	Vision and Strategy
Group 2: Led by Rachel Nickeas	
1.	Vision and Strategy
2.	Diversity
3.	Accessibility
Group 3: Led by Dr Steve Millington	
1.	Accessibility
2.	Innovation and Adaptability
3.	Networks and Partnerships
Group 4: Led by Tom Hindmarch	
1.	Experience
2.	Anchors
3.	Use and communication of funding

Figure 3: outcomes of group activity

Adaptability

Group 1 and Group 3 both listed **Adaptability** as a main priority, highlighting examples of how places in Warwickshire have adapted to the difficult circumstances brought about by the pandemic. One workshop participant explained how some towns have fared better than others because businesses were more flexible and adaptive to the challenges they are facing, especially in relation to use of digital technology. It was noted these examples of best practice should be shared more widely with towns and businesses across the region to secure a robust recovery.

Vision and Strategy

Group 1 and Group 2 both listed **Vision and Strategy** as a main priority, emphasising the need for each town to have a clear vision for place-improvement and a comprehensive strategy in place to achieve that vision on a short, medium, and long-term basis. As part of the discussion, it was stated how there was a concern at a lack of leadership to drive forward a vision and strategy in each town, and this should be a priority going forward. Rather than view this as a competition between each town, it was noted that if more towns across the county worked together and shared best practice, there could be mutual benefits across the region.

Networks and Partnerships

Group 1 and Group 3 both listed **Networks and Partnerships** as a main priority, which underlines the importance of collaborative working to ensure each town achieves its full potential. Participants

talked about the need to work together in a more effective way, otherwise some town centre schemes, or high street projects, may fail to gain ‘buy-in’ from the wider community. It was also noted how the three-tiered system of local government can be difficult to navigate at times, with one participant, a newly employed council officer, relaying his own struggle to understand how each layer worked with each other. The need to ensure a wide range of local stakeholders are involved in the development and implementation of projects was also discussed.

Accessibility

Group 2 and Group 3 both listed **Accessibility** as a main priority, with the need to ensure more is done to improve wayfinding within towns and enhance connectivity between them. On a local level, as most of the centres are quite compact, it was stated more could be done to encourage cycling and walking, which itself is a 25-priority factor. There were concerns expressed about the way in which both visitors and residents navigate centres, based on the view visitors tend to only visit key attractions, and bus services do not serve communities on the periphery of towns, making it difficult for residents who live a few miles out to access their nearest centre. On a regional level, it was discussed how there is a need to mitigate the disruption HS2 is causing to transport routes and encourage alternative ways of travelling, to mitigate climate change.

Diversity, Innovation, Experience & Anchors

Several groups listed priorities which were unique to them and were not listed by others. Group 2 identified **Diversity** as a main priority, since some of the towns have similar shops on the high street and a greater diversity of offer is needed to attract residents and visitors into the centre. Group 3 listed **Innovation** as a main priority, in relation to the need to be bold and ambitious with projects, however, it was noted that some residents are hesitant to embrace change. Finally, Group 4 listed **Experience** as a priority, on the basis perceptions of some of the smaller towns is poor and additional problems, such as lack of public toilets and parking, prevent visitors from having a good experience. Group 4 also listed **Anchors** as a priority, because many of the towns have recently lost retail anchors, such as Debenhams, Topshop and Marks and Spencer, and there is need to address how the space vacated by those retail anchors is used.

Lessons from wider experience

In 2014, as part of the ESRC-supported HSUK2020 project, the IPM undertook a comprehensive literature review to identify factors contributing to centre vitality and viability (see Parker et al., 2017). This identified 160 factors, which formed a point of discussion with multiple stakeholders in the ten UK town centres who were partners in the project. This process identified additional factors, which were subsequently linked published academic research, but it also revealed new factors, yet to be studied by academics. In total, the study identified 201 factors that affect town centre vitality and viability. The systematic review was replicated in 2020 for the High Streets Task Force, which considered recent evidence and research, which subsequently extended the number of factors to 237. However, as they stand, the factors have no sense of priority or importance. Therefore, 22 leading town centre experts drawn from practitioners and researchers were asked to rank them using two scales: how much a factor impacted on town centre vitality and viability, and how much local control could be exercised over a factor. This then led to the ‘Top 25 Factors’ impacting vitality and viability, detailed in Appendix 1 below. Our recommendation is these can initially be used as an audit tool to assess how Warwickshire is performing, and then to determine a strategy.

Specific factors affecting the vitality and viability of Warwickshire

A survey completed by 17 stakeholders from Warwickshire on 30th July, asked participants to consider how much local effort there is to support each of the 25 factors, and then asked how important they thought each factor was to their centre within the county of Warwickshire. Stakeholders were given 20 minutes within the session to undertake the survey and it was completed by representatives from 9 centres across the region:

Centre Representation	No. completed the survey
Leamington Spa	4
Stratford-upon-Avon	3
Warwick	3
Nuneaton	2
Southam	1
Kenilworth	1
Atherstone	1
Alcester	1
Rugby	1

In terms of resourcing, Figure 4 below shows how the group ranked each factor according to their perception of how well each factor is resourced in within centres in Warwickshire.

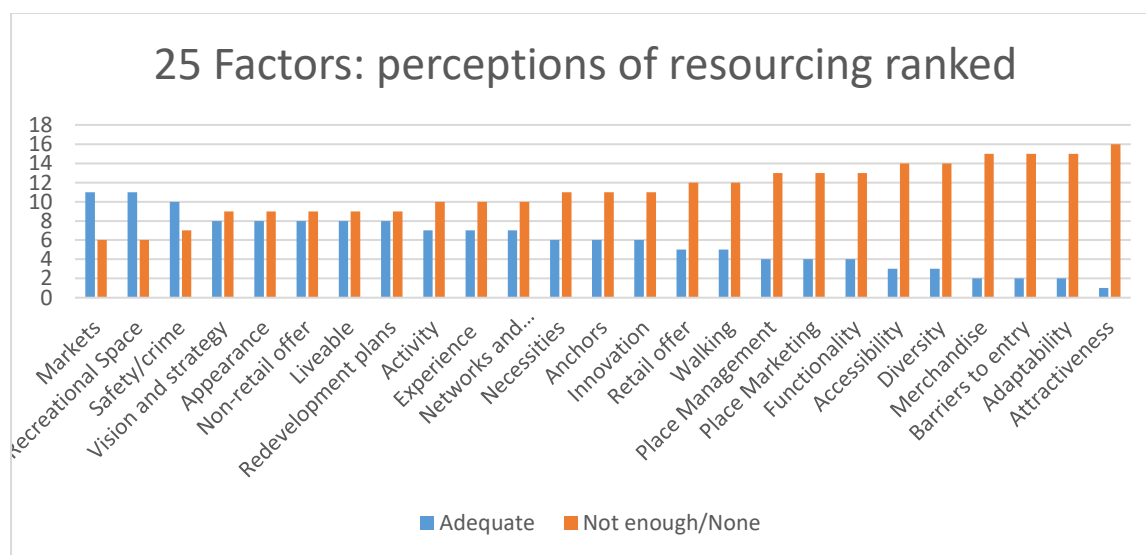


Figure 4: 25 factors: perceptions of resourcing ranking

Most of the group perceives Recreational Space, Markets, and Safety/Crime, are sufficiently resourced, whereas all the remaining factors are seen to be under-resourced, notably Attractiveness, Merchandise and Barriers to Entry.

Another consideration is the IPM Ranking (on the x-axis). For instance, a clear majority of respondents perceive Adaptability is inadequately resourced, but this is ranked as the 21st most important priority by the IPM. There is a similar consensus regarding Merchandise, which the IPM's ranks 10th in terms of its impact on the vitality and viability of high streets and centres. All places have limited resource and need to prioritise spending. In the example discussed here, there is a logic in focusing on supporting interventions, which are likely to have most impact. In Warwickshire's case then, there is an argument for prioritising Merchandise over Adaptability. However, it is important to remember, these are perceptions of resourcing are from stakeholders within different centres within the county. Therefore, further analysis may be required to identify specific priorities for each centre in Warwickshire. It is also important to note that this data is based on personal perceptions, and it may be the case certain factors are genuinely under-resourced, although the reality may be different, suggesting more work needs to be done locally to communicate the level of effort supporting each factor more clearly and widely across the town.

The other consideration though is to what extent, say Merchandise, is important to Warwickshire. Figure 5 below, therefore, shows how the group ranked each factor according to their perception of how important the factor was to centres in Warwickshire:

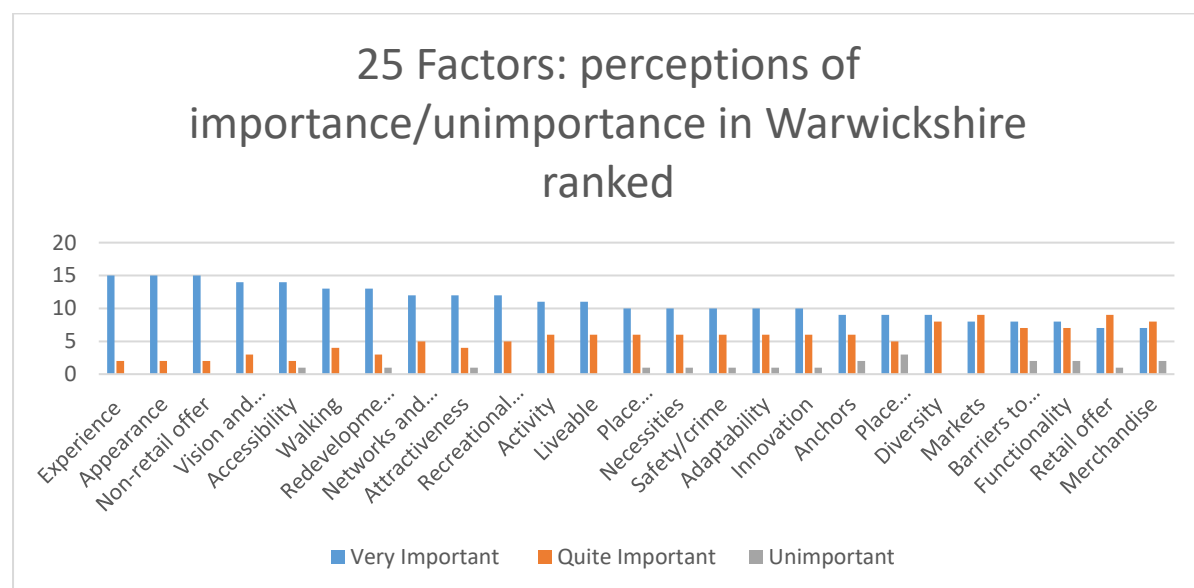


Figure 5: 25 factors: perceptions of importance to Warwickshire ranking

According to this data, Merchandise may well be seen as under-resourced, but the group thinks other factors are more important to their centre. For instance, the group was unanimous in identifying Experience, Appearance and Non-retail offer as the most principal factors in Warwickshire. In addition, there is a clear majority suggesting Vision and Strategy, Accessibility, Walking and Redevelopment Plans, are also important to the town centre. Interestingly, many of these key factors were also mentioned within the focussed group discussion. The group discussion is explored further in the next section, but the factors Adaptability, Accessibility, Networks and partnerships and Vision and strategy featured strongly.

In interpreting this data, it is also important to note the ranking of each factor (see appendix for full description) by the IPM according to potential impact on vitality and viability, and levels of local control:

1. Activity	14. Accessible
2. Retail offer	15. Diversity
3. Vision and strategy	16. Attractiveness
4. Experience	17. Markets
5. Appearance	18. Recreational Space
6. Place Management	19. Barriers to entry
7. Necessities	20. Safety/crime
8. Anchors	21. Adaptability
9. Non-retail offer	22. Liveable
10. Merchandise	23. Redevelopment plans
11. Walking	24. Functionality
12. Place Marketing	25. Innovation
13. Networks and partnerships	

Figure 6: 25 factors in rank order

For example, Experience is seen as most important to Warwickshire centres, which according to research collated by the IPM is an area of intervention that is more viable and potentially impactful but 7 out of 17 who completed the survey felt it Experience is resourced in their centre. This trend is also similar for the factor ranked second most important factor appearance, which is also one of the more impactful factors.

To help get a sense of where priorities lie in Warwickshire, therefore, the matrix below plots both perceptions of resourcing and importance against each other:

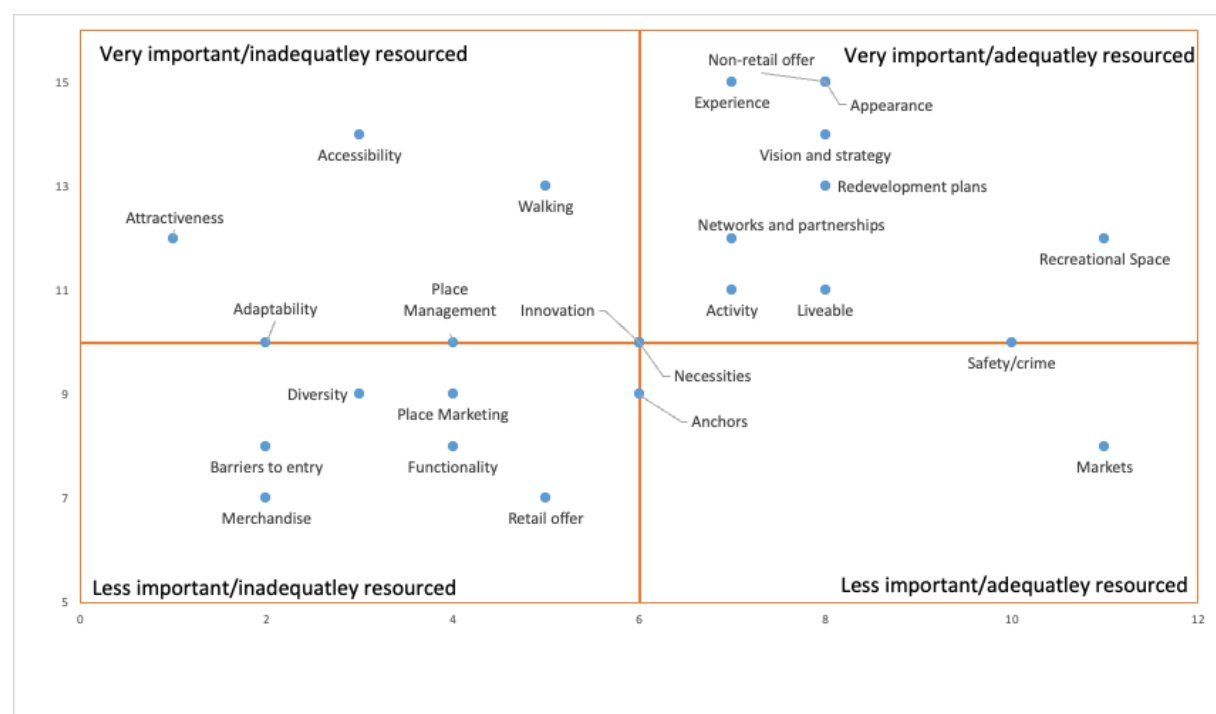


Figure 7: Survey matrix

Figure 7 may help in terms of deciding priorities. The factors clusters in the right-hand boxes are perceived to be adequately resourced, whereas those on the left are seen as inadequately resourced. Those in the top half are perceived to very important, compared to the factors clustered in bottom two boxes. Consequently, factors such as Attractiveness, Accessibility and Walking are all seen as very important considerations, but the moment the consensus amongst the stakeholders is they require more resourcing. That said, according to the IPM's ranking, none of these are in the top 10, whereas place management which currently sits on a border above, is considered to have a much greater on vitality and viability. The IPM's 25 Factors, however, are not a prescription for change. Neither is it the case that all centres must address all 25 equally. We would suggest the findings presented above, therefore, form the basis of future discussions in a process whereby local stakeholders in each centre agree a vision and shared priorities for their town.

Going forward

The series of workshops has identified several shared concerns and issues about the future of Warwickshire's centres. The findings from the interactive workshop (delivered on 29th July) presented in this report draws attention to what these changes might be, and what action local stakeholders might take. The report provides only a snapshot from the workshop findings. Our recommendation is that Warwickshire County Council encourages each of the centres involved in the routemap to review in more detail the 25 factors and see how their centre is performing in respect of each. The IPM could support this by opening the survey conducted within the workshop to representatives in each centre. In addition, the IPM team could undertake place quality audits in set locations across Warwickshire as an additional element to this project.

In communicating a potential strategy for Warwickshire to take forward, it is important to acknowledge there are potential quick wins (such as place activation), whereas other interventions are only achievable in the long-term. Addressing wider concerns such as lack of funding are not as easy to influence at a local level. That said, Warwickshire has several strong attributes, and it may be the case that many existing interventions and activity simply need to be more effectively communicated across a wider range of stakeholders across the county to highlight best practice and innovation. A cross-county working group could be a worthwhile outcome of this work with IPM focussing on issues raised within the programme.

The Institute has developed a four-element framework for regeneration that enables full attention to be given to areas of need. The four areas where a difference can be made are repositioning, reinventing, rebranding, and restructuring. The second part of the Future Places Network will cover the '4Rs' in depth and will focus on what action can be taken at local level, rather than the contextual approach that has been followed in the first part of this programme. These workshops, together with engagement with the online learning resources on the High Streets Task Force website should enable local stakeholders to identify the priorities for each centre in Warwickshire and construct their own fishbone analysis based on the 4Rs.

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Appendix 1: The IPM 25 priorities for vitality and viability

1 Activity

Description: Activity (or town centre activity) is understood as patterns and levels of everyday usage. It refers to a high street or town centre being open for people for a variety of uses (retail, leisure, social exchange, entertainment, work, etc).

Activity includes: Opening hours; footfall; shopping hours; evening economy.

2 Retail offer

Description: Retail offer is the overall range of retailers and services available on the High Street including the availability and variety of products and services (comparison/convenience, luxury, discount), retail channels (store-based, online only, click and collect) and retail formats (from small independent shops to shopping centres) that are aimed at satisfying the needs of consumers.

Retail offer includes: Retailer offer; retailer representation

3 Vision and strategy

Description: The continuing economic, social, and other challenges that shape the High Street necessitate the development of a clear, shared, and compelling vision that sets out long-term aspirations, aims and goals. Effectively, a vision lays down the blueprint for future strategic development and regeneration of a place, which is then adopted by the wider community.

Vision and strategy include: Leadership; collaboration; area development strategies.

4 Experience

Description: Experience refers to a person's perception and sense of a place, and can comprise physical, cognitive, and emotional attributes. Experience of a place can be related to a number of factors such as whether it feels welcoming, if it is a good place to spend time, overall customer service experience of retail premises, transport and public space, and environmental factors such as air quality, noise levels and lighting.

Experience includes: Centre image; service quality; visitor satisfaction; familiarity; atmosphere.

5 Appearance

Description: Appearance refers to the quality of the public realm and aesthetics of a place. It involves cleanliness, but also other aspects that can translate into positive (or negative) experiences such as lighting, green elements (e.g., trees or flower baskets or beds), congruent landscape (in harmony with the vision and identity of the town), and management of unused spaces.

Appearance includes: Visual appearance; cleanliness; ground floor frontages

6 Place management

Description: The Institute of Place Management (IPM) defines place management as "a coordinated, area-based, multi-stakeholder approach to improve locations, harnessing the skills, experiences and resources of those in the private, public and voluntary sectors".

Place management includes: Centre management; Shopping Centre Management; Town Centre Management (TCM); Place Management; Business Improvement Districts (BIDs)

7 Necessities

Description: Necessities refers to basic amenities and facilities such as car and bicycle parking, benches and other street furniture, rain and shade structures, streetlights, public toilets, pavements, etc.

Necessities include: Car-parking; amenities; general facilities.

8 Anchors

Description: A high street anchor can be described as any type of attraction or infrastructure that significantly increases the presence of people (footfall) in the high street and the surrounding areas. Anchors can be retail, employment, public transport hubs, greenspace, heritage, or culture etc.

9 Non-retail offer

Description: Non-retail offer refers to the opportunities in a centre beyond retail. It includes bars and restaurants; leisure, entertainment, arts, and culture; business and employment; education; health services; and housing.

Non-retail offer includes: Attractions; entertainment; non-retail offer; leisure offer.

10 Merchandise

Description: Merchandise refers to the range, assortment, and quality of goods in a centre. It also refers to whether a centre meets the needs of the catchment through the merchandise it offers. Merchandise is not only about availability, but also about pricing, discounts, samples, etc. that customers benefit from.

Merchandise includes: Range/quality of goods; assortments; merchandising.

11 Walking

Description: Walking refers to how walking-friendly an area is, the quality of walking conditions, including safety, comfort, and convenience. It also includes other aspects that can improve the walking experience: car free zones, appropriate lighting, signing, etc.

Walking includes: Walkability; pedestrianisation/flow; cross-shopping; linked trips; connectivity.

12 Place marketing

Description: Place marketing is traditionally concerned with the development and subsequent promotion of a place product, as well as the construction of a sellable place image that can highlight local difference and enhance a place's competitive position.

Place marketing includes: Centre marketing; marketing; orientation/flow.

13 Networks & partnerships with council

Description: Networks & partnerships with council refers to the presence of strong networks and effective formal or informal partnerships with council, business, and the community. It includes any collaborations that can positively influence the high street.

Networks & partnerships with council include: Networking; partnerships; community leadership; retail/tenant trust; tenant/manager relations; strategic alliances; centre empowerment; stakeholder power; engagement.

14 Accessible

Description: Accessibility of a town centre or high street refers to its ease of reach, and to how convenient it is to access it, by a variety of different modes of transport. It also includes how well the centre is connected digitally.

Accessible includes: Convenience; accessibility; connected (including digital).

15 Diversity

Description: Diversity is about facilitating a variety of offers that makes a place attractive to live and work in and refers to the importance of making sure places are vibrant and viable at different times of the day, week, and year, attracting different markets for a range of activities.

Diversity includes: Range/quality of shops; tenant mix; tenant variety; availability of alternative formats; store characteristics; comparison/convenience; chain vs independent; supermarket impact; retail diversity; retail choice.

16 Attractiveness

Description: Attractiveness is an economic term and refers to the 'pulling power' of a centre and relates to KPIs that measure its performance, over time.

Attractiveness includes: Sales/turnover; place attractiveness; vacancy rates; attractiveness; retail spend; customer/catchment views; Construction of OOT centre.

17 Markets

Description: Markets add to the pleasure of the customer experience and for markets that sell locally produced goods they act as signifiers for local identity, providing colour and character and focusing on regional wares and specialities.

Markets include: Traditional markets; street trading.

18 Recreational space

Description: Recreational space refers to the amount and quality of recreational areas and public space/open space and places that are uncommodified where people can enjoy spending time without spending money.

Recreational space includes: Recreational areas; public space; open space.

19 Barriers to entry

Description: Barriers to entry refers to hindrances that are associated with the profile and characteristics of the location (land prices, rents, vacancy rates, whether there is ground for development, absence/presence of competitors, land uses, commercial lease agreements) that stop new entrepreneurs trading in the centre.

Barriers to entry includes: Barriers to entry; property owners.

20 Safety/Crime

Description: Safety/crime is a centre KPI measuring perceptions of safety and crime and actual recorded crime including shoplifting.

21 Adaptability

Description: Adaptability refers to the flexibility of the space, property, and operators in a centre. It is about the flexibility of the planning system and how units can be re-let or re-purposed. It also involves how adaptable retailers are to change their type or style of retail activities in relation to potential shifting consumer behaviour and catchment needs.

Adaptability includes: Retail flexibility; retail fragmentation; flexibility; store/centre design; retail unit size; store development; rents turnover; store/centre design.

22 Liveable

Description: Liveable refers to the resident population or potential for residence in the centre. Having town centre residents supports many businesses, particularly food shops, cafes, restaurants; that is, retail and non-retail offer that can improve the vitality and viability of a centre. A liveable place is concerned with quality of life and community wellbeing.

Liveable includes: Multi/mono-functional; liveability; personal services; mixed use.

23 Redevelopment plans

Description: Planning for redevelopment is a complex process involving developers, planners, landowners, investors, community groups, and businesses. Redevelopment plans can often exclude and silence the relevant and most vulnerable stakeholder groups (e.g., small businesses, consumers, residents) in favour of 'high-returning' redevelopment projects that are influenced by corporate capital and desensitise people from their place. Town centre regeneration, where misguided can stall plans and leading to situations that have a negative impact on town centres and high streets.

Redevelopment plans include: Planning blight; regeneration.

24 Functionality

Description: Functionality refers to the degree to which a centre fulfils a role – e.g., service centre, employment centre, residential centre, tourist centre.

25 Innovation

Description: Innovation refers to transformation that is not just dependent on traditional investment and development but includes place leaders and partnerships being creative and experimenting in their approaches to town centre development. This approach could include encouraging pop-up shops, festivals, events, and community use of redundant retail space.

Innovation includes: Opportunities to experiment; retail innovation.